

VA National Office of Social Work and VA Homeless Programs Office

VA and SSI/SSDI Outreach, Access, and Recovery (SOAR)

June 5, 2017 at 3:00 PM EDT

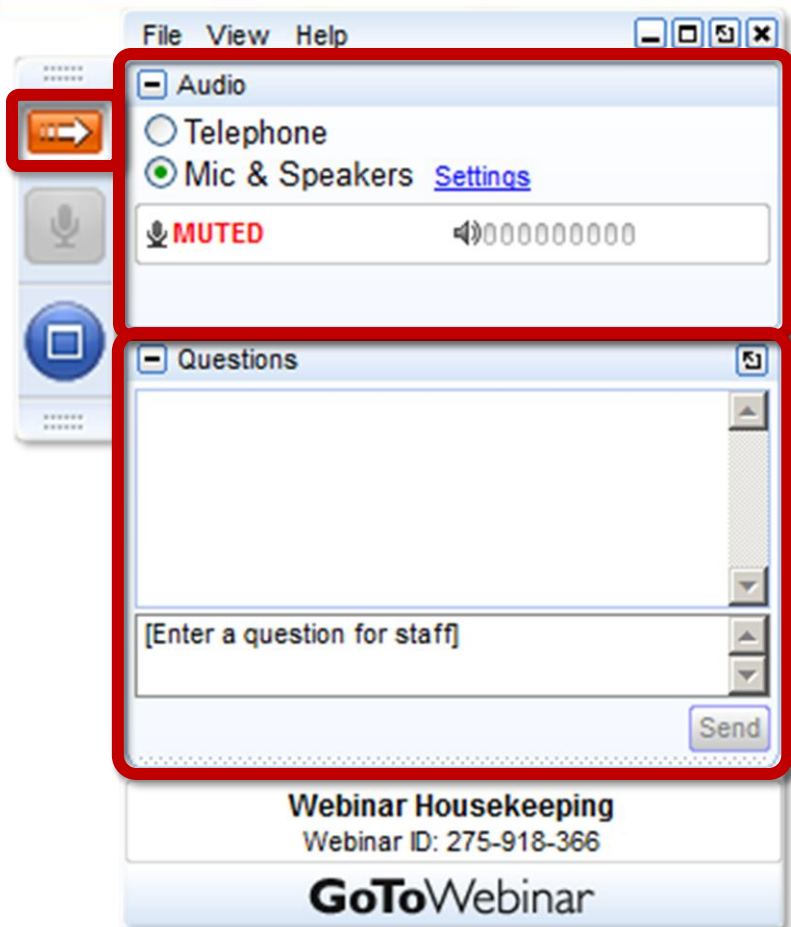
[Audio Available:](#)

<https://attendee.gotowebinar.com/recording/2391141305442650113>

Webinar Format

- Webinar will last approximately 90 minutes
- Participants' phone connections are “muted” due to the high number of callers
 - **Questions can be submitted during the webinar using the Q&A function**
- Questions can also be submitted anytime to [SSVF@va.gov](mailto:ssvf@va.gov)

Questions



Your Questions

Submit questions and comments via the Questions panel

Panelists

- Laura Taylor, National Director, VA Social Work
- John Kuhn, National Director, Supportive Services for Veteran Families (SSVF)
- Adrienne Nash Melendez, Regional Coordinator, SSVF
- Jen Elder, SAMHSA SOAR TA Center, National Policy and Partnerships Coordinator

Agenda

- Opening Remarks
- VA and SOAR Memo
 - Policy
 - History
 - Training
- SOAR Overview
- Questions and Answer

Opening Remarks

- Why access to benefits is critical
- Joint collaboration between Social Work and Homeless Programs
- Support from VA Office of Healthcare Ethics, VA Legal, and the Social Security Administration

What Is SOAR

- **SSI/SSDI Outreach, Access, and Recovery (SOAR)** helps disabled adults who are homeless or at risk of homelessness apply for SSI/SSDI.
- Sponsored by HHS's Substance Abuse and Mental Health Services Administration (SAMHSA) beginning in 2009.

Why Use SOAR

- Provides critically needed income for disabled, homeless and at-risk
 - SSI/SSDI approval rates 28% nationally (10-15% for homeless) and takes on average 1 year
 - Using SOAR, SSI/SSDI approval rate jumps to 67% and takes on average 101 days.

Who Does SOAR

- Social workers and case managers working with homeless and at-risk.
- Must complete specialized training using SAMHSA SOAR TA Center online curriculum.

VA and SOAR Memo

SOAR Policy Memos

October 18, 2013

**Department of
Veterans Affairs**

Memorandum

Date: **OCT 18 2013**

From: Acting Deputy Under Secretary for Health for Operations and Management (10N)

Subj: Employees Encouraged to Assist with SSI/SSDI Outreach, Access and Recovery (SOAR)

To: Network Directors (10N1 – 23)
Chief Medical Officers (10N1 – 23)
Network Homeless Coordinators (10N1 – 23)

1. The goal to end homelessness among Veterans by the end of 2015 remains a top priority for VA. To get there, communities are highly encouraged to explore all available resources from Federal, State, and local government, as well as from the private sector. Specifically, existing resources such as Social Security Income/Social Security Disability Income (SSI/SSDI) also have the ability to substantially serve the at-risk and homeless Veteran population by providing them with consistent income that often promotes permanent housing stability, self-sustainment, functional independence, and ongoing care for at-risk and homeless Veterans' disabling conditions.
2. Since the SSI/SSDI application process is cumbersome, VHA personnel in all homeless programs are encouraged to be trained in and utilize the SOAR

May 8, 2017

**Department of
Veterans Affairs**

Memorandum

Date: **MAY 08 2017**

From: Deputy Under Secretary for Health for Operations and Management (10N)

Subj: Employees Should be Assigned to Assist with Supplemental Security Income/Social Security Disability Insurance (SSI/SSDI) Outreach, Access and Recovery (SOAR) (VAHQ 7772148)

To: Network Directors (10N-23)
Chief Medical Officers (10N1-23)
Network Homeless Coordinators (10N1-23)

1. The goal to end homelessness among Veterans remains a priority for the Department of Veterans Affairs (VA). To get there, communities are encouraged to explore all available resources from Federal, state, and local government as well as from the private sector. For example, existing non-VA resources, such as SSI/SSDI, can substantially assist the at-risk and homeless Veteran population by providing them with consistent income that often promotes permanent housing stability, self-sustainment, functional independence, and ongoing care for at-risk and homeless Veterans' disabling conditions.
2. Because the SSI/SSDI application process is cumbersome, Veterans Health Administration (VHA) personnel in all homeless programs should be assigned to be trained in and utilize the SOAR program. SOAR is a Federal Interagency project with the SOAR Technical Assistance Center funded by the Substance Abuse and Mental Health Services Administration. SOAR is designed to increase access to SSI/SSDI benefits for eligible adults who are homeless or at risk of homelessness and have a mental illness, medical impairment, and/or a co-occurring substance use disorder. SOAR is proven to increase the approval rate for those applying, as well as expediting the time it takes for individuals to obtain access to such financial benefits.

VA and SOAR Policy-October 18, 2013

- Access to benefits (VBA and SSA) aligns with goal of ending Veteran homelessness
- Guidance encouraged VA employees to assist eligible Veterans that would benefit from SOAR and removed misconceptions that staff could not assist with SSI/SSDI
- Restrictions prevented VA staff from acting as authorized representative (form SSA-1696)

VA and SOAR Policy-May 8, 2017

- Reaffirms importance of SOAR
- **Removes Previous Barrier**
 - VA staff can now sign SSA Form 1696.
 - Allows VA staff to share information with SSA on behalf of Veteran applicant, answer questions, and act as POC for SSA requests even without the Veteran being present.
- Veteran must also sign VA Form 10-5345, Request for and Authorization to Release Medical Records and Health Information.

Implementation

- Assigned means encouraged
- Expect each VAMC to have the capacity to provide SOAR
- Number of staff trained is at the discretion of the VAMC based on assessed demand/need
- Training must be completed through the online curriculum

VA Experience with SOAR

Highlights

October 2013:
1st VA Memo
on SOAR

December
2013:
Introduction
to SOAR for
SSVF Grantees

October 2014-
September
2015: HUD-
VASH and
HPACT SOAR
Pilot

February
2015: SOAR in
SSVF NOFA

July/August
2015: USICH
Key Strategies
and GPD,
SSVF, and
SOAR Webinar

Winter 2016:
VA
Caseworker's
Guide to SOAR

May/June
2017:
Enhanced
Memo and
Training

Annual SOAR Surveys since 2013

HUD-VASH and HPACT Pilot and VA Caseworker's Guide



Pilot Overview:

Increasing Veteran Access to Social Security Income/Disability Insurance (SSI/SSDI)

In October 2014, the SSI/SSDI Outreach, Access, and Recovery (SOAR) Technical Assistance (TA) Center and the Veterans Health Administration (VHA) Homeless Program staff launched a one year pilot to increase access to SSI and SSDI through SOAR for Veterans experiencing homelessness with disabling conditions who utilize Housing and Urban Development and Veterans Affairs Supportive Housing (HUD-VASH) and Homeless Patient Aligned Care Team (H-PACT) services.

HUD-VASH	The U.S. Department of Housing and Urban Development-Veterans Affairs Supportive Housing	A collaborative program between HUD and VA where eligible homeless Veterans receive a Housing Choice rental voucher from HUD paired with VA providing case management and supportive services to sustain housing stability and recovery from physical and mental health problems, substance use disorders, and functional concerns contributing to or resulting from homelessness.
H-PACT	The Department of Veterans Affairs' (VA) Homeless Patient Aligned Care Team	Co-locates social workers, medical providers, and homeless program staff to provide holistic care at VA medical centers, community-based outpatient clinics, and Community Resource and Referral Centers (CRRCC).



HUD-VASH and H-PACT social workers, knowing the supportive services a Veteran needs based on their mental and physical illnesses, are well placed to provide critical documentation for SSI/SSDI applications.

Four cities were chosen as pilot sites to implement SOAR in their HUD-VASH and H-PACT programs: Chicago, IL; Long Beach, CA; Portland, OR; and Seattle, WA. Each program named 1-2 SOAR Champions, who will be trained to complete SSI/SSDI applications and lead SOAR efforts in their programs, in collaboration with their local and state SOAR initiatives.



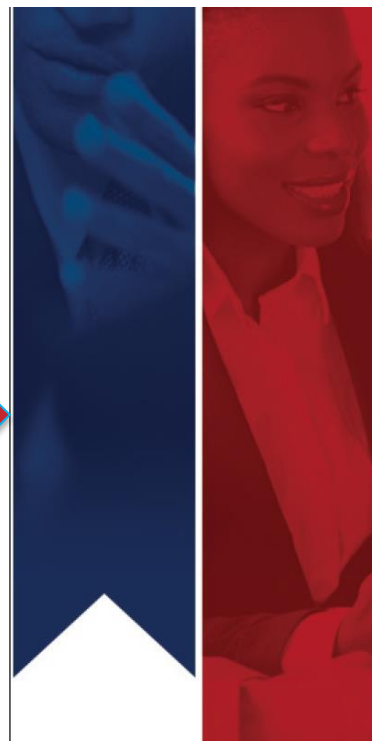
The SAMHSA (Substance Abuse and Mental Health Services Administration) SOAR TA Center and VHA Homeless Program Office will provide technical assistance throughout the pilot, including facilitation of local VA and SOAR planning processes, guidance through the SOAR online course, and monthly check-in calls with the pilot sites.

SOAR Works to End Veteran Homelessness: VA Caseworker's Guide

Version 1, Winter 2016

U.S. Department of Veterans Affairs
Homeless Veterans Program

Download the guide at
http://www.va.gov/homeless/docs/VA_SOAR_Guide.pdf



SOAR Training

- *SOAR Background for VA Staff*
 - *VA Caseworker's Guide to SOAR (Update on 6/5)*
 - https://www.va.gov/homeless/docs/VA_SOAR_Guide.pdf
- *SOAR Online Curriculum:*
 - <https://soarworks.prainc.com/course/ssissdi-outreach-access-and-recovery-soar-online-training>
 - Training is FREE, self-paced and takes 16-20 hours
 - Online course is through the SAMHSA SOAR TA Center, not TMS
- 20 CEUs from the NASW are available for those who successfully complete the course



Using SOAR to Connect Veterans to Social Security Benefits

*SSI/SSDI Outreach, Access and Recovery
Technical Assistance Initiative*

**Jen Elder, M.Sc., National Policy and Partnerships Coordinator,
SAMHSA SOAR TA Center**

Disclaimer: The views, opinions, and content expressed in this presentation do not necessarily reflect the views, opinions, or policies of the Center for Mental Health Services (CMHS), the Substance Abuse and Mental Health Services Administration (SAMHSA), or the U.S. Department of Health and Human Services (HHS).

SSI/SSDI Outreach, Access & Recovery

- Focuses on people who are experiencing or at risk of homelessness
- A model for assisting individuals to apply for Social Security disability benefits
- Sponsored by the Substance Abuse & Mental Health Services Administration (SAMHSA) in collaboration with SSA since 2005
- SOAR is active in all 50 states; no direct funding is provided to states

Changing Lives Since 2005

- **31,356** persons experiencing or at risk for homelessness have been approved on initial application
- **67%** approval rate overall, in an average of **101** days in 2016
 - Compares to 10-15 percent for unassisted applications from people who are homeless and 28 percent for all applicants
 - Top 10 states have served over 9,400 individuals, average 84% approval
- Appeals can take a year or more; many people give up and do not appeal

SSI & SSDI: The Basics

- SSA: Social Security Administration
- SSI: Supplemental Security Income; needs based; federal benefit rate is \$735 per month in 2017; provides Medicaid in most states
- SSDI: Social Security Disability Insurance; amount depends on earnings put into SSA system; Medicare generally provided after 2 years of eligibility
- The disability determination process for both programs is the same

What is the need?

- In January 2016, 39,471 Veterans were homeless on a single night during PIT count
 - SOAR can also serve those who are at-risk for homelessness, or who are in permanent housing without income
- Half of Veterans experiencing homelessness have severe mental illness and over half have other health issues
- High prevalence of traumatic brain injury (TBI), post-traumatic stress disorder (PTSD), and sexual trauma among homeless Veterans contributes to difficulty in maintaining employment and housing

Importance of SSI/SSDI for Veterans

- SSA disability benefits can provide access to:
 - Income – Veterans can receive SSI/SSDI in conjunction with, or as an alternative to, VA disability benefits and employment
 - Health insurance – Veterans can use the Medicaid and Medicare health benefits that comes with SSI/SSDI to supplement VA health services
- SSA Benefits + Employment + VA Benefits = Income Stability
- Goal is to find the *right combination of income supports* for each Veteran to obtain and maintain housing stability

SSA Definition of Disability

- The definition of disability and application process is different for VA and SSA benefits
- For SSI/SSDI, the Veteran needs to show:
 - Evidence of a physical or mental health condition, which results in functional impairments that limits his/her ability to work at a substantial gainful level (quantified as \$1170/month in 2017)
 - That the disabling condition has lasted, or is expected to last, for 12 months or end in death
- **Why is the applicant unable to work and earn \$1170/month?**

SSA Fast Track Programs

100% Permanent and Total Veterans Initiative

- Expedites SSI/SSDI applications from Veterans who have 100% P&T rating from the VA
- Does not guarantee SSI/SSDI approval

Wounded Warriors

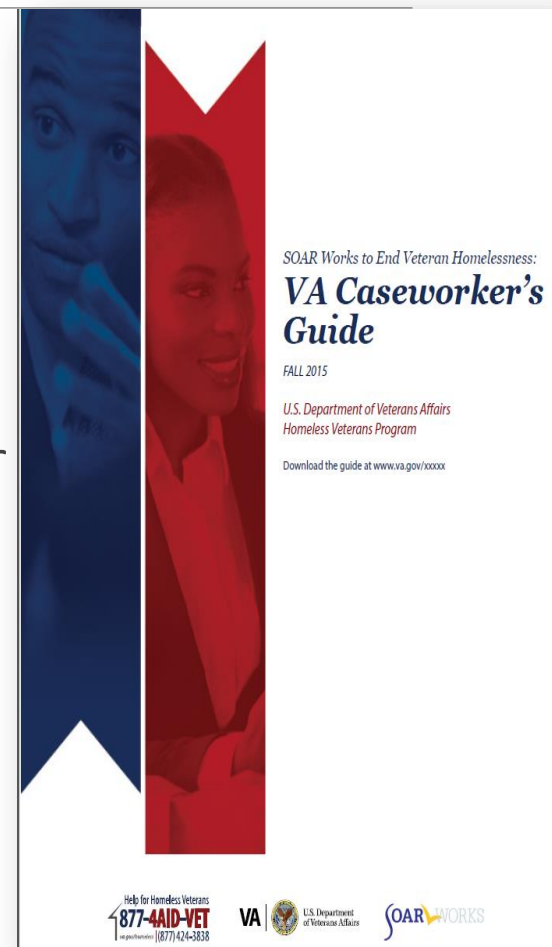
- Veterans who received disabling mental or physical health injuries while on active duty on or after October 1, 2001
- The injury does not need to have occurred during combat operations

VA Guidance on SOAR

SOAR Works to End Veteran Homelessness: VA Caseworker's Guide

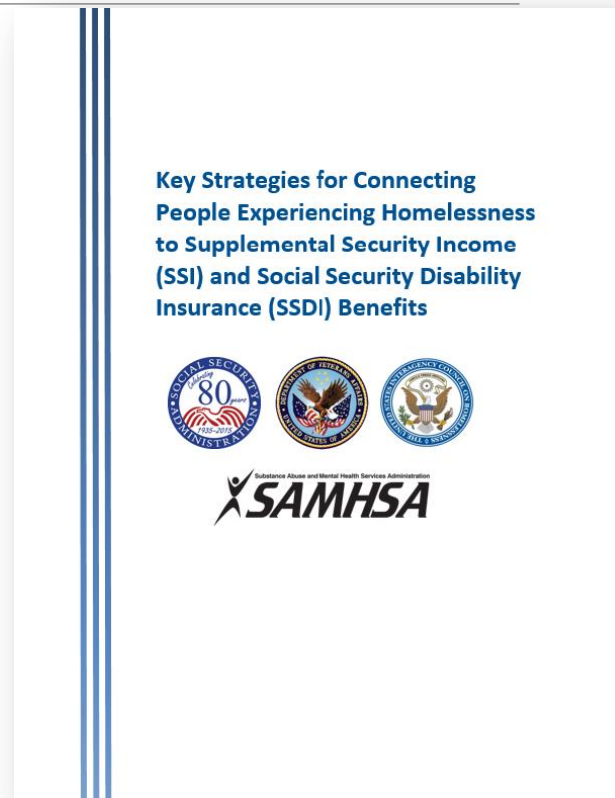
- Step-by-step guide on using SOAR after completing the SOAR Training
- Crosswalk of where to find key information for SSI/SSDI in VHA assessments
- Full of tips on how to efficiently complete applications using the SOAR model

https://www.va.gov/homeless/docs/VA_SOAR_Guide.pdf



Key Strategies for SSI/SSDI Assistance

- Developed by USICH, SSA, SAMHSA, and VA
- Provides guidance to the field on key strategies for linking eligible adults to benefits
- Intended to improve practice and collaboration among SSA field offices, VAMC staff, and other organizations and community-based partners



<https://www.usich.gov/tools-for-action/key-strategies-for-connecting-people-experiencing-homelessness-to-ssi-ssdi>

SOAR Online Course

<https://soarworks.prainc.com/>

- **Free**, web-based course to train case managers in completing SSI/SSDI applications using SOAR
- Standardized, self-paced training
- Includes completion of a practice SSI/SSDI application
- Individualized feedback from the SOAR TA Center
- 20 CEUs from NASW
- Class 1 of the course provides a “SOAR 101”

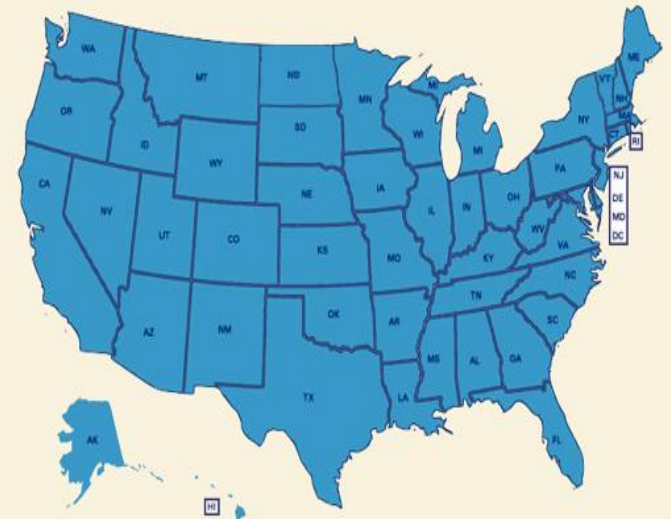
Get Involved with SOAR

<https://soarworks.prainc.com/directory>

- Find your SOAR TA Center Liaison
- Find your SOAR State Team Lead
- Connect with SOAR in your community

SOAR In Your State

SOAR is available in all 50 states. Please use the map below to view information for your state.



Contact Us

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Additional Questions

SSVF Program Office

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Website:

www.va.gov/HOMELESS/ssvf.asp

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